


## #6 - Purdue Elements: Adding and Editing Records – Grants, Service and Learning & Teaching

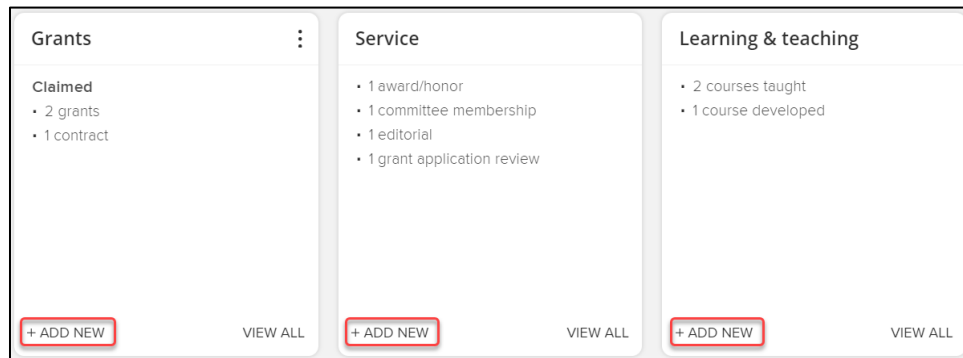
Grants and Learning & Teaching will be automatically harvested at regular intervals as summarized in the table below. Additional details on data sources can be found on the Purdue Elements website listed in the footer.

Type of Data	Data Source	Timing
Grants	SPS / Digital Measures	Month end close
Learning & Teaching	Banner/ Watermark	Term end freeze
Service	Not harvested	Manual entry

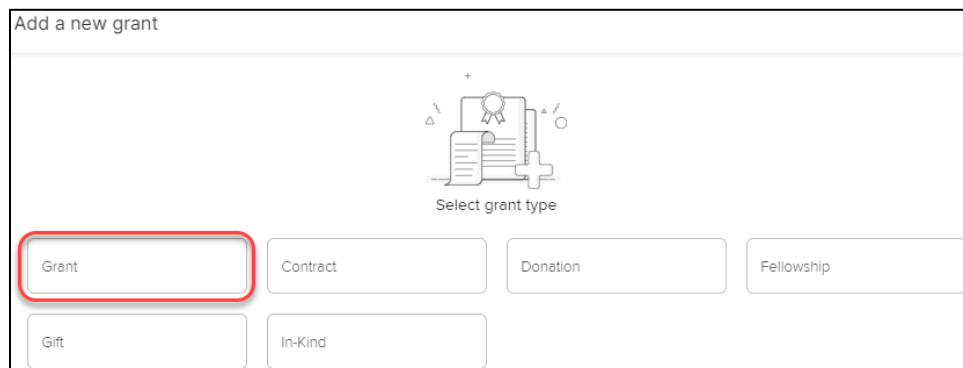
If specific records have not been automatically harvested or imported, users can enter them into Purdue Elements manually.

### I. Adding Records: Grants, Service, and Learning & Teaching

Grants/Service/Learning & Teaching records can be added via the respective tiles located on the Homepage, by clicking on the “Add New” option (alternately, users can click on “View All” option and then on  icon in the top right corner).



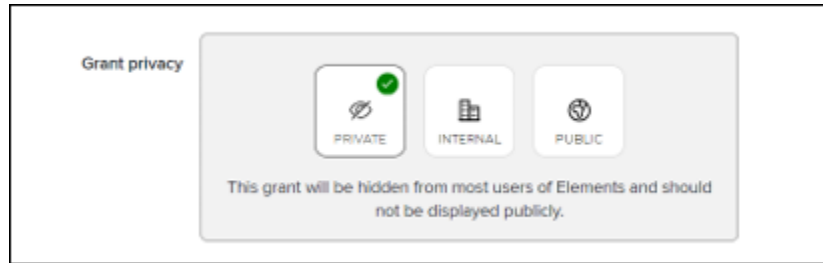
A pop-up window will appear. Select the Grants/Service/Learning & Teaching record type from the options provided, for instance, “Grant”:



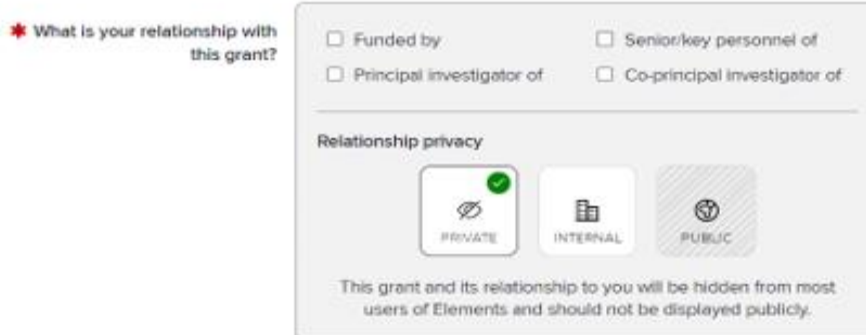
**Provide Details About the Record**

A new page will open to provide details about the record.

- Required fields are marked with red asterisks (\*).
- Guidance is provided for some fields marked with a large question mark (?).
- In the “Grants/Service/Learning & Teaching Privacy” section the user can set the overall privacy level for the Grant/Service/Learning & Teaching (each level is described when the user clicks on a corresponding button). This step is optional.



- In the next, required section - “What is your Relationship with this Grant/Service/Learning & Teaching?”:
  - First, select the role with the Grant/Service/Learning & Teaching
  - Then, select the privacy level for this section only, i.e., the user’s relationship with this Grants/Service/Learning & Teaching (each level is described after clicking on a corresponding button).



- When populating “Essential Information” section fields, the user should make sure to provide all required information.

The screenshot shows a form titled "Essential Information" with the following fields:

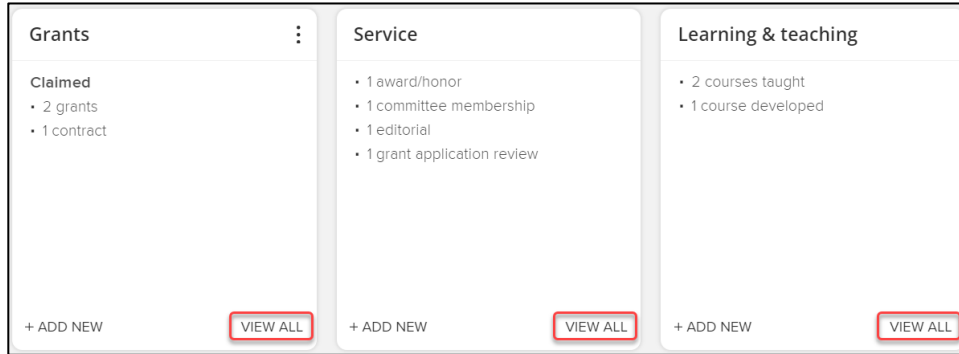
- Title** (required, marked with a red asterisk): Text input field.
- Status** (required, marked with a red asterisk): Dropdown menu with "[Select an option]" selected.
- Sponsoring Organization** (required, marked with a red asterisk): Text input field.
- Sponsoring Organization Agency**: Text input field.
- Sponsoring Organization Type**: Dropdown menu with "[None]" selected.
- Sponsoring Organization Subagency**: Text input field.
- Total Proposal Amount** (required, marked with a red asterisk): Currency dropdown (USD) and text input field.
- Total Award Amount**: Currency dropdown (USD) and text input field.
- Direct Cost**: Currency dropdown (USD) and text input field.
- Indirect Cost**: Currency dropdown (USD) and text input field.
- External Reference**: Text input field.
- Grant Number**: Text input field.

- Note: if offered, the last field in the section, “AACSB Classification,” is only used by the Daniels School of Business.
- When done filling out the form, click “Save.” The Grant/Service/Learning & Teaching will be placed on the user’s Claimed Grants/Service/Learning & Teaching list.

## II. Editing Records: Grants, Service, and Learning & Teaching

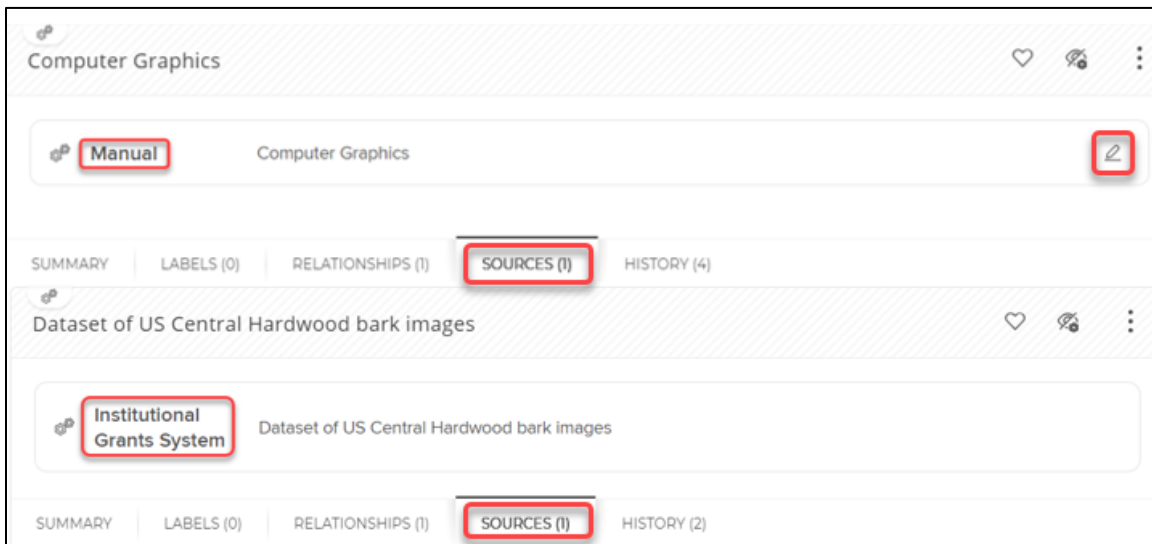
Manually added records can be edited to ensure all information is correct and/or to add new information.

Access the Grants/Service/Learning & Teaching records via the respective tiles located on the Homepage, by clicking on the “View All” option.

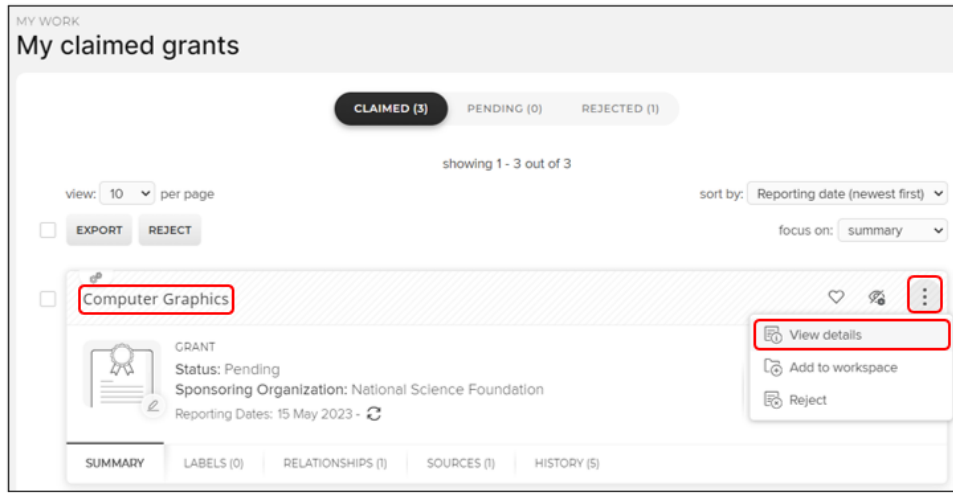


The Claimed list will be displayed by default.

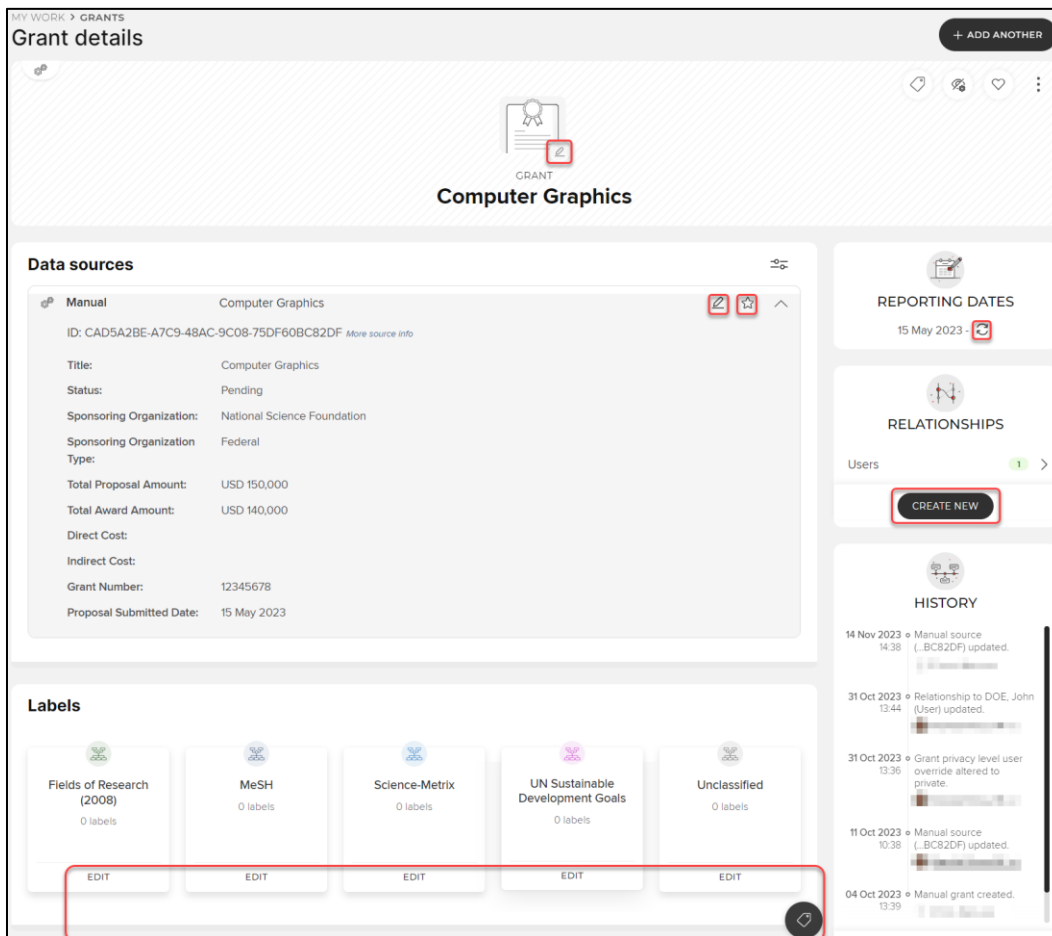
Note: Only records with manual sources should be edited. To determine a record’s source(s), click on the “Sources” tab. The record source(s) will be displayed. Only a manual-source record will have a pen icon on the right – the user should click on it to edit the record form. Steps to edit the record are the same as for “Adding Records” listed above on page 2 (**Provide Details About the Record**).



In order to edit a Grant/Service/Learning & Teaching record comprehensively, the user should click on the vertical ellipsis (:) icon and select “View Details.” Alternately, the user can click on the record name:



A page with record details will open:



There are several fields that can be edited from this view:

- Thumbnail – click on the pen icon and upload an image of their Grant/Service/Learning & Teaching in one of the specified formats.
- Record – a new page with record form will open – for instructions, see “provide details about the record” on page 2 above.
- Set preferred record – click on the “Star” icon to make this a preferred record.
- Labels – click on a specific label tile to edit a single label or click on the “Manage labels” icon to edit all labels.
- Reporting Date – click on the “Free circular arrows” icon, switch from automatic to manual date management and enter the desired date (the provided calendar feature can be used, or the user can enter reporting date in DD MMM YYYY format, for example: 08 Nov 2023).
- Relationships – the user can create a new relationship link for a record by clicking on the “Create new” button. A pop-up window with menu options will open:

Create links to this grant

Select category to link to

Scholarly & creative work Grant Service User

Learning & teaching Group

Example:

Creating a new link between the user’s Grant and Scholarly & Creative Work, Grant, Service, or Learning & Teaching record:

- Click on the desired category
- A new page will open:

< RETURN TO THE PREVIOUS PAGE

## Create links

**Create links between...**

Scholarly & creative works  Grants  Service

Learning & teaching

**... and...**

Scholarly & creative works  Grants  Service

Learning & teaching

**Grants**

You are currently defining links for a single grant. [Click here](#) to use filters instead.

You specified 1 item:

[Select all](#)

- Computer Graphics [View](#)
- Existing links (to a user)

Or you could...

[+ Add a new grant](#)

**Scholarly & creative works**

DOI:

Or:

Title:

Linked to: John Doe

Type: Any

Journal:

Published after: 16/11/2020

Published before:

[Go!](#)

In the top section, the left side indicates the record type the user is creating a link for, while the right side indicates the record type the user is linking to.

In the bottom left section, the record the user is creating a link for is displayed. There is an option to use filters to locate the desired record. Also, additional records can be added here to link along with the already selected record.

In the bottom right section, the user can use DOI or filters to locate the record the user would like to link to. Then, click "Go!" A list of available records will be displayed.

Note: If the user already has scholarly works, these may appear in this section (instead of the filter fields). In such cases, the user should select the desired record from the list. To change current filters, click on the "Change" button and filter fields will appear:

**Scholarly & creative works**

Current filters:

- Linked to: John Doe
- Published: from 27/11/2020

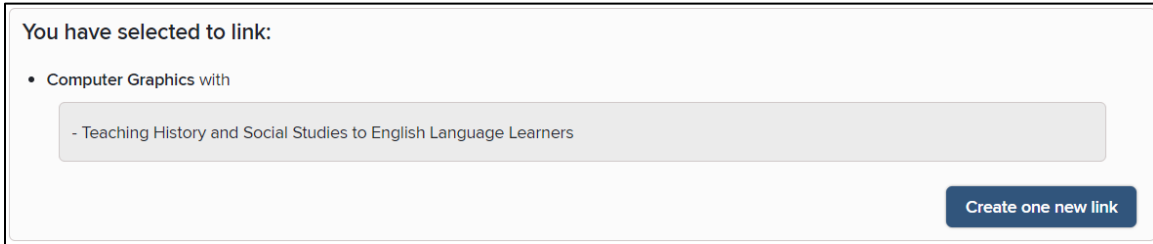
[Change](#)

We've found 3 matching results:

[Select all](#)

- [View](#)
- Existing links (all to users)
- [View](#)
- Existing links (3 to users)
- [View](#)
- Existing links (1 to a user)

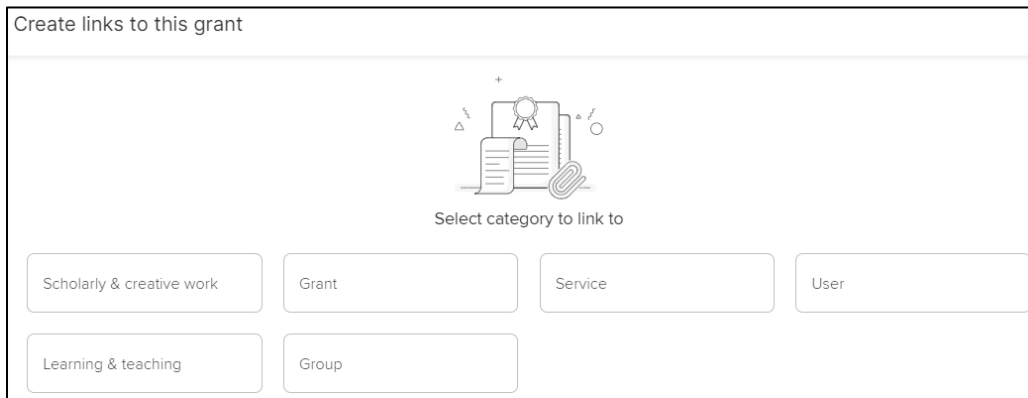
After a record is selected from the list, the following message will be displayed:



The user should click “Create One New Link.” The records will turn green to denote the linking.

Example: Creating a new link between the Grant and User or Group

- Click on the record category to link to (User or Group)



- A new page will open with a list of available Users/Groups
- Use the name filter on the right to find a User/Group
- Then, click on the checkmark associated with the User/Group
- Click on the “Link Selected” dropdown menu to specify User’s/Group’s role (Funded by, Senior/Key Personnel, Principal Investigator, or Co-Principal Investigator)
- Click “Done” – the Grant and User/Group are now linked.

